VOLUNTEERING IN
NHS LOTHIAN
POLICY INCLUDING NHS LOTHIAN
EXPENSES PROCEDURE FOR
VOLUNTEERS
1. Introduction

There is a long history of volunteer involvement in NHS Lothian and volunteers contribute in a variety of ways. Volunteers may be recruited directly or indirectly through voluntary organisations that provide help and patient support within healthcare settings or to specific voluntary sector projects that NHS Lothian fund and/or support.

NHS Scotland has a number of strategy documents providing guidance on volunteering. This policy reflects government strategy (Refreshed Strategy for Volunteering in the NHS Scotland CEL10 (2008) that requests NHS Boards to put in place action plans and policies, which do the following:

1. Provide clarity about what constitutes volunteering in Scotland’s NHS
2. Ensure effective leadership in volunteering
3. Plan for continuous improvement in volunteering management
4. Create a positive and consistent environment for volunteering
5. Develop a modern, dynamic and robust infrastructure for volunteering
6. Broaden the range of people involved in volunteering
7. Measure the impact of volunteering and shared learning

A volunteer is defined as a

“A person who gives freely and willingly of their time to help improve the health and wellbeing of patients, users (and their families and carers) of the NHS in Scotland.” (CEL 11 2013)

The scope for volunteer involvement is wide and varied and includes work carried out by volunteers both on NHS Lothian premises and in the community. Volunteering is used to describe a range of activities. For example:

- Helping staff and supporting patients in a ward
- Buddies to support breast feeding mums in hospitals and in the community
- Signposting patients/public to clinics in a hospital
- Volunteering in a hospital library
- Hospital/ward inspections (patient experience quality indicators (PQI visits)

This policy is mainly about this group.

Additionally some people are involved in

- Reference groups or networks to work with NHS Lothian in planning and redesigning services

Information will be provided by individual departments or services for people who are interested in being involved.

Other people want to do work experience, undertake research or shadow staff and should look on HR on-line for further information (http://tinyurl.com/nbfya27).
2. Purpose

In issuing this Volunteering Policy, NHS Lothian:

- Formally acknowledge and support the roles of volunteers
- Set out the principles governing the involvement of volunteers through the provision of a volunteer procedural document to ensure good working practice
- Define the roles, rights and responsibilities of NHS Lothian and of the volunteers
- Encourage and enable, rather than limit, the involvement of volunteers from all sections of the community without discrimination as required by Equal Opportunities and Equality and Diversity legal requirements
- Have set out financial guidance/policy on the payment of out-of-pocket expenses.

The Volunteering Policy and accompanying procedures are intended primarily for the use of NHS Lothian staff and volunteers. A commitment to the principles contained within them would also be expected from voluntary organisations whose volunteers provide support within NHS Lothian. However, NHS Lothian respects the independence of these voluntary organisations and recognises that they are responsible for the management of volunteers carrying out specific projects, as agreed with NHS Lothian management.

NHS Lothian recognises that the population it serves is diverse, and a volunteer’s age, carer responsibilities, disability, employment status, ethnicity, faith/belief, sexual orientation, socio-economic status will have an impact on their needs. Even within these groupings there will be differing individual needs and it is essential to acknowledge that this diversity may impact on the needs of volunteers. NHS Lothian will endeavour to act on these needs to ensure fair and equal access to volunteering opportunities by working in an inclusive manner, considering and valuing all potential and actual volunteer contributions.

3. Relationship with NHS Lothian Employees

NHS Lothian is committed to ensuring that:

- Steps are taken to ensure that staff at all levels, are clear about the role of volunteers and to foster, good working relationships between staff and volunteers.
- The activities undertaken by volunteers complements the work of paid staff and will not be used as a substitute for paid work. Volunteers add value, support and diversity to the work of NHS Lothian.
High profile or VIPs visits e.g. sports stars, politicians or other celebrities must be authorised and co-ordinated by NHS Lothian Communication and Public Affairs Department. Individuals must always be accompanied by NHS Lothian or charity partner staff in order to protect patients, staff and volunteers.

Training and support is provided for those working alongside and managing volunteers.

The safety and wellbeing of NHS Lothian patients, volunteers and staff is paramount. The standard of care and conduct of volunteers should be of the same high quality as that of employees.

Volunteers are not asked to do the work of paid staff during times of industrial action, however at such times they may continue with their regular duties.

Volunteers are treated with dignity and respect. NHS Lothian encourages an organisational culture that recognises and respects the individual and their contribution to the NHS. NHS Lothian takes any form of intimidating behaviour seriously (see HR online preventing bullying and harassment http://tinyurl.com/go6w7mq).

4. Funding

NHS Lothian recognises that developing effective volunteering programmes is an investment with significant benefits, however there are many associated costs including staff time. NHS Lothian is committed to identifying and covering the costs of involving volunteers, for example, reimbursing expenses, covering all costs of recruitment, selection, training, staff support, and VSM roles to manage volunteers.

5. Recruitment and Selection

NHS Lothian will:

- In line with Human Resources and Government policies, recruit volunteers from all sections of the community. This will include requesting references from persons nominated as referees on the application form and completing an occupational health form. Volunteers are asked to disclose any criminal conviction or any criminal charges pending against them and are required to complete a Disclosure Application at the time of application (see Appendix 1). The minimum age volunteers is 16 years. NHS Lothian will follow advice on legislative changes to the Disclosure system to ensure checks are carried out in a suitable and timely manner.

- Acknowledge the importance of social inclusion and recognise that all prospective volunteers have something of value to offer.
• Place volunteers in accordance with appropriate volunteer recruitment and selection procedures, volunteer placements will be defined by the needs of NHS Lothian and its patients.

• Make all reasonable effort to find suitable placements for those who offer their time and energy. Where there is no suitable placement, the volunteer will be informed of the reasons and redirected, where appropriate, to another agency.

6. Information and Training

NHS Lothian will provide:

• New volunteers to NHS Lothian with a formal induction process.

• Training/support in the tasks to be undertaken

• Ongoing opportunities for learning and development

• The ‘Volunteering in NHS Lothian: A Handbook for Volunteers (2017). Full information about their area of volunteering and their responsibilities to NHS Lothian (including information about disciplinary and grievance procedures for volunteers and about their rights and responsibilities if something goes wrong)

• Information on other legislation and policies e.g. Health and Safety, which may affect them and will be treated in the same way as staff for liability purposes.

7. Support and Supervision

Volunteers will be assigned a named contact person for supervision and support, and will be given clearly specified lines of accountability.

Risk assessments, where indicated, will be completed with all volunteers to ensure that their individual support needs can be addressed wherever possible.

By encouraging volunteers to contribute to NHS Lothian there are both opportunities and risks created. Any risk assessments for a project or volunteering opportunity will extend to volunteer involvement. Volunteers should be encouraged to tell someone if they feel they are being asked to do anything that makes them feel unsafe – for whatever reason, or if they feel that a patient is being put at risk. This should be discussed with the named support person and that person should acknowledge and deal with their concerns. Risk Assessments are carried out in each area to ensure volunteer/staff needs are addressed.

8. Expenses and Insurance

People who are involved in the work of NHS Lothian should not be left out of pocket or be put at risk of being financially worse off as a result of participating in the activities of NHS Lothian.
Expenses must be agreed by the VSM/project prior to the volunteers starting.

NHS Lothian will ensure that all reasonable and actual expenses incurred by the Volunteer whilst carrying out the tasks will be reimbursed by NHS Lothian through a clear, consistent, accessible and equitable system for claiming reasonable out-of-pocket expenses within the Lothian boundaries, see Appendix 2 (see separate expense claim form).

**Volunteers are covered by insurance whilst they carry out their agreed duties both on NHS Lothian’s premises and in the community.**

For further information please see NHS Lothian Volunteer Expenses Procedure – Appendix 2.

**9. References**

On the basis of their volunteering, volunteers will have the right to request a reference from their named contact person or Voluntary Services Manager.

**10. Organisational Expectations of Volunteers**

Volunteers are expected to:

- Participate in induction sessions and training relevant to their volunteering roles and placements.

- Maintain standards of practice that reflects the standards and values of NHS Lothian.

- Comply with all NHS Lothian policies and procedures, particularly in relation to Public Protection, data protection, Incident Reporting, Health and Safety.

- All volunteers must have the NHS Policy on Confidentiality explained to them and sign a confidentiality statement before starting their placement. Volunteers should be encouraged to discuss any concerns or queries with an appropriate member of staff.

- Undertake their volunteering at agreed times.

- Inform the relevant member of staff, as soon as possible, if they are unable to attend, and if possible in advance.

- Give notice if unable to continue volunteering. Raise any issues of concern relating to their volunteering with their named contact person, Voluntary Services Manager or appropriate other.
11. Fostering a relationship with the local voluntary sector

A strategic approach to the development of volunteering will be taken and the work of local Volunteer Centres and Voluntary Sector Gateways or equivalent agency in providing leadership in the voluntary sector will be recognised.

Organisations commissioned by NHS Lothian to carry out work which involves volunteers or who wish to provide a service within NHS Lothian must have a Service Level Agreement between the organisation and NHS Lothian using the agreed CLO template which is signed by the organisation providing the service and the manager of the NHS service involved and forwarded to the NHS Lothian Voluntary Services lead prior to any volunteers starting on a placement.

12. Volunteering Procedures and Guidance

Supporting documents are in place to ensure appropriate recruitment and placement of volunteers.

- NHS Lothian Volunteer Recruitment Procedure
- NHS Lothian Volunteer Expenses Procedure

13. Impact Assessment

This policy was Equality Impact Assessed in December 2011.
Appendix 1: Volunteer Recruitment and placement flow chart

IMPLEMENTING VOLUNTEERING

Volunteer Request form completed by member of staff

Role Description

Duties approved

Advertised

Informal Interview with prospective volunteers

Completion of paperwork

Identification of placement

Take up references

Complete Disclosure

Occupational Health Check

When all paperwork is returned/complete

Induction & Training

Orientation with VSM/Mentor

Meet Staff & Volunteers

Placement Trial Period

Meet Staff & Volunteers

Placement Unsuitable

New Placement Identified

Ongoing on job training/mandatory training updates

Discuss alternative avenues for volunteering if placements continue not to work out

Reviews
NHS LOTHIAN
VOLUNTEERS / EXPERTS
EXPENSES CLAIMS
PROCEDURE

Unique ID:  Author (s): Financial Controller
Category/Level/Type: Procedure
Status: Final
Version: 2.0
Date of Verification: 13 April 2017
Verified / Approved by: Head of Financial Control
Date added to Intranet: 13 April 2017
Review Date: March 2019
Key Words: Volunteers, Volunteering Expenses, Expenses
Comments:
1. Introduction

NHS Lothian values the contribution of patients, members of the public and particular interest specialists to the work of NHS Lothian and recognises that developing effective volunteering programmes is an investment with significant benefits. This procedure is intended to provide a consistent basis for the payment of expenses for all volunteers, in the widest sense, who work alongside or are under the supervision of NHS Lothian staff as part of a range of committees or managed voluntary services/activities.

2. Scope of Procedure

This procedure is for anyone involved in the volunteering services/activities across NHS Lothian and special interest committees or groups.

There are two classifications of volunteers. A volunteer who gives freely and willingly of their time to help improve the health and wellbeing of patients, carers and users of NHS Lothian and GP services and other staff groups or specialist for participation in a range of committees and meetings arranged by the Board. This includes individuals who incur expenses as a result of participating in relevant activities to which they have been invited by NHS Lothian e.g. workshops, focus groups, committees, working groups, conference speakers and volunteers supporting specific services etc.

It is recognised that in order to encourage full participation from a wide range of relevant people in some of the committees or special interest groups that to recompense individuals or their employer for the costs of their attending meetings should be considered.

Any recompense should be to cover out-of-pocket expenses such as locum cover and travelling and subsistence. It is not intended to offer a fee for such attendance to the individual or their employer.

The general principles of this procedure are:

- that no volunteer should be out of pocket as a result of his/her volunteering work
- reimbursement is not appropriate unless actual expense is incurred in the course of volunteering

If a specialist participating in a group or committee meeting claims a fee for attending then the specialist will need to be set up with a Provision of Service Agreement. Further details can be obtained from the Financial Controller or Head of Financial Control as to how this is taken forward.
3. Travel Allowances

3.1 Out of Pocket Expenses

Volunteers are to be encouraged to use public transport to and from their place of volunteering where possible. Reimbursement of costs of travel tickets, car parking charges, bus, underground, ferry or taxi fares (where prior approval for use of a taxi has been given) can also be made. Appropriate receipts, used tickets or ticket stubs must be attached to the claim.

3.2 Travel by Private Motor Car, Motor Cycle or Bicycle

The mileage allowances for travel by private car, motor cycle or bicycle are shown in Appendix 1. There are two levels of car mileage allowance and volunteers should be advised as part of their induction which rate will apply in reimbursement if their travel costs.

3.2.1 Public Transport Rate

The ‘Public Transport Rate’ which is intended to cover the cost of fuel only and not motoring costs, is payable where volunteers use their private motor vehicle to commute between their home (normally within Lothian) and the place of volunteering but are not required to use their car for their volunteering business and when suitable public transport is available and appropriate in the circumstances.

3.2.2 Standard Mileage Rate

The Standard Mileage Rate, which takes motoring costs such as insurance and road tax into account, is payable when volunteers use their private motor vehicle for volunteering business e.g. volunteer drivers: or volunteers who use the own cars in direct connection with their volunteering and therefore incur business miles.

The mileage rates, which accord with the current guidelines of HM Revenue and Customs, shown in Appendix 1 should be paid to volunteers who:

- drive their own private motor vehicles (including motor cycles) as defined below in connection with their volunteering but subject to the limitations set out elsewhere in this section; and
- meet the insurance requirements set out below

3.2.3 Passenger Mileage Rate

Appendix 1 also includes a passenger mileage rate payable to volunteers in certain circumstances. Payment of this allowance will apply:

- where volunteers carry other volunteers to the place of volunteering or if attending training or meetings etc. in the same way as this is applied when staff carry other staff as passengers (this is in line with current guidance and with payments to staff)
3.3 **Motor Vehicle Insurance**

Volunteers involved in managed volunteering activities using their private motor vehicle or a vehicle owned by a spouse or partner on volunteering business must satisfy certain insurance conditions in order to claim the motor mileage allowance. It is the responsibility of the volunteers to ensure that their vehicle insurance policy covers the risks set out below.

The Voluntary Services Manager or Group Organiser is responsible for verifying that volunteers are covered by the appropriate vehicle insurance at induction and on an annual basis thereafter.

Motor mileage allowance will be payable only if the insurance conditions are fulfilled. A standard letter for the volunteer to send to their insurance company is attached at Appendix 2.

Volunteers using their private motor vehicle or a vehicle owned by a spouse or partner on volunteering work must have motor vehicle insurance without financial limits covering the following:

- bodily injury to or death of third parties
- bodily injury to or death of any passenger
- damage to the property of third parties

In addition the insurance policy must specifically cover the use of the vehicle on volunteering business. This also applies in the case of a vehicle owned by a spouse or a partner.

3.4 **Volunteers’ Liability**

It is strictly prohibited for a volunteer to drive any vehicles as part of their volunteering duties for NHS Lothian unless they have a valid driving licence. It is the responsibility of the volunteer to ensure the licence is valid.

4. **Subsistence Allowance**

4.1 **Volunteers entitlement to subsistence allowance**

Subsistence allowance is designed to cover reasonable out of pocket expenses spent mainly on meals, other minor personal incidental expenses and accommodation. This will include reimbursement of expenses incurred by volunteers when they attend training events in connection with their volunteering work. See Appendix 1 for current subsistence rates.
4.2 Day Subsistence Allowance

Day subsistence allowance up to the amounts shown in Appendix 1 is payable when the volunteer meets the prescribed minimum periods details below and has actually incurred an additional out of pocket expense to purchase a meal or meals in the course of their volunteering activity:

- day subsistence over 5 hours payable for a period of volunteering of more than 5 hours but less than or equal to 10 hours
- day subsistence over 10 hours for a period of volunteering of more than 10 hours.

This is not an automatic payment and relates only to the reimbursement of expenses incurred up to the rates shown in Appendix 1. Volunteers require to provide receipts to verify their claims but it should be recognised that this may not always be possible and staff should consider claims where it is reasonable to expect the volunteer to have incurred expense. No subsistence is payable where the volunteer is provided with a meal or meal vouchers by NHS Lothian.

4.3 24 Hour Subsistence allowance

The 24 hour subsistence allowance covers a period of up to 24 hours and includes expenditure on overnight accommodation and breakfast, lunch and dinner and personal incidental expenses (e.g. personal telephone calls). Bed and breakfast costs must be supported by a receipt attached to the travel and subsistence claim.

4.4 Staying With Friends Allowance

If an overnight stay is necessary in the course of the volunteering and the volunteer resides overnight with and in accommodation provided by friends or relatives, irrespective of the circumstances, they can claim the Staying with Friends Allowance. This allowance is a 24 hour rate designed to cover accommodation and all meals in the 24 hour period starting when the journey commenced. Receipts are not required to be produced to support the payment of this allowance. Volunteers are also allowed to claim the personal incidental expenses allowance in addition to this allowance if expenses are incurred.

5. Communication/Consumable Expenses

On production of receipts volunteers should, where agreed in advance and where the costs are specifically incurred as a requirement of their volunteering activity be reimbursed the costs of ink cartridges, paper, labels, envelopes, telephone calls and stamps, although these items should be obtained through the normal procurement process agreed by NHS Lothian Procurement department.
6. “Other” Expenses

Volunteers can also claim the “other” expenses detailed in the table below.

<table>
<thead>
<tr>
<th>Expenses Other</th>
<th>Eligibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reimbursement of receipted childcare expenses (subject to ceiling equivalent to the current hourly childminding rate paid by the local authority) or other carer expenses.</td>
<td>All Volunteers who incur such expenses while undertaking their volunteering duties. These expenses should be discussed prior to appointment</td>
</tr>
<tr>
<td>Reimbursement of reasonable receipted additional expenses of people with disabilities.</td>
<td>All volunteers who have a disability and incur such additional expenses while undertaking their volunteering duties. These expenses should be discussed prior to appointment</td>
</tr>
</tbody>
</table>

7. Claim Form

The claim form (Appendix 3) and guidance on how to complete can be obtained either from the NHS Lothian intranet or from VSMs/ Public Involvement Coordinators.

8. Timescales and Payment Methods

8.1 Timescales

Claims should normally be submitted within a month and no later than three months after the volunteering activity to which it relates.

Any claim received after three months should be forwarded to the Deputy Director of Finance. It will be their discretion if reimbursement should be made.

8.2 Advances

To eliminate the need for advances, travel and accommodation arrangement should be booked through the Travel Team. The Travel Team operates on the basis that generic requirements should be requested using the TA1 form available on the Staff Intranet at Travel, leaving the Travel Team to put together a suitable Value for Money package to meet the stated requirements, taking account of times, distances and standards of service and accommodation. Completed authorised TA1 forms should be emailed to travel@nhslothian.scot.nhs.uk

NHS Lothian can make provision, where it is considered appropriate, for an advance of expenses to individual volunteers to cover anticipated travel and subsistence expenses. These advances can, if requested, be paid by Electronic Transfer into the
volunteer's bank account. Volunteers should then complete and submit a travel claim form showing the actual expenses and the advance received as soon as possible following the travel. Any advance must be authorised by the Head of Financial Control or the Financial Controller (Financial Accounts).

8.3 Cash Payments

Claims up to the value of £50 can be paid out in cash when the fully completed, calculated, coded and authorised form is presented by the volunteer to a hospital cashier. Appendix 4 provides a list of the various Cash Offices and their opening hours.

8.4 Electronic Bank Payments and Cheque Payments

If the volunteer provides their bank details on the claim form payment will be made directly into their bank account, if not, a cheque will be issued. Completed, calculated, coded and authorised forms should be sent to the appropriate team for processing as indicated on the claim form.

8.5 BACS Payments

This is the payment method used by NHS Lothian for volunteers who submit claims on a regular basis. The third claim within a twelve month period will invoke the need for the Volunteer to be set up as a Supplier on the Accounts Payable system. This is an internal process and should not result in any additional requirement from the Volunteer or cause any delay in settlement. Completed, calculated, coded and authorised forms are to be sent to the Accounts Payable Team in Finance for processing.

9. Travel and subsistence Rates

9.1 Travel Rates Reviews

The travel rates are set by the Government and are in published on the HMRC website. The Financial Controller will review the rates after each budget statement to ensure the policy is updated.

9.2 Subsistence Rates Reviews

Subsistence allowances are set by the Scottish Government. Any update to the allowances will be notified to the Health Boards via a CEL with any changes being amended in a revised policy.
Appendix 1 – Travel and Subsistence Rates For Volunteers in NHS Lothian

Travel and Subsistence Rates payable from 6th April 2011 (with exception of the extension of the passenger mileage for volunteers which is payable from 1st of April 2012)

### Motor Mileage Rates

<table>
<thead>
<tr>
<th>1. Public Transport Rate</th>
<th>24p per mile</th>
<th>This will be paid to volunteers travelling by car from home to their place of volunteering. Mileage outwith the Lothian boundary must be negotiated.</th>
</tr>
</thead>
<tbody>
<tr>
<td>2. Standard Mileage Rate</td>
<td>45p per mile for the first 10,000 miles and 25p thereafter</td>
<td>This standard motor mileage rate will be paid to volunteers who in the course of their volunteering duties use their vehicle i.e. people working as volunteer drivers.</td>
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</tbody>
</table>
| 3. Passenger Allowance   | 5p per mile | From 1st of April 2012 for the carriage of more than one passenger/patient e.g. volunteer car drivers (this is not per passenger)  
From 1st of April 2011 for each passenger where this relates to the carriage of other volunteers for meeting/training etc |
| 4. Motor Cycle Mileage   | 24p per mile |                                                                                                                                  |
| 5. Bicycle               | 10p per mile |                                                                                                                                  |

### Public Transport Costs

Reimbursed at the journey / day saver rates

### Subsistence Rates

<table>
<thead>
<tr>
<th>1. Day Subsistence</th>
<th>£4.90</th>
<th>Volunteering for more than 5 hours but not more than 10 hours where meals are purchased (not payable if meals are provided)</th>
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<td></td>
<td>£10.70</td>
<td>Volunteering for more than 10 hours where meals are purchased (not payable when meals are provided)</td>
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<tr>
<td>2. 24 Hour Subsistence</td>
<td>£55.00</td>
<td>Receipted cost of bed and breakfast up to a limit of. Although discretion can be applied depending on the costs of B &amp; Bs available.</td>
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<td></td>
<td>£20.00</td>
<td>Plus meals allowance</td>
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</table>
3. Staying With Friends Allowance £25.00 Per night

4. Personal Incidental Expenses Allowance £5.00

5. Overnight by Train or Boat £24.10 Per night

Other Expenses

1. Reasonable receipted childcare or other carer expenses.

   Eligibility: all volunteers who incur such expenses in the course of their volunteering work

   These expenses should be discussed prior to appointment and / or allocation of specific duties

2. Reimbursement of reasonable receipted additional expenses for people with disabilities

   Disability is defined in accordance with the Disability Discrimination Act.

   Eligibility: all volunteers with a disability who incur such additional expenses in the course of their volunteering. Any needs should be discussed with the Voluntary Service Manager first.

   Where a volunteer due to disability requires the use of a taxi, then the rate of reimbursement should be discussed / negotiated and agreed at the time of appointment to the role. It is further recognised that there may be occasions when volunteers become temporarily disabled and again the payment of taxi fares should be negotiated prior to agreement for the use of a taxi with the Volunteer

Notes

1 Based on the HM Revenue & Customs Approved Mileage Allowance Payment rates.
2 Only payable when overnight stay is required.
Appendix 2 - Sample Letter to Insurance Company

Name
Address
Date

To (insurance Company)
Re (Policy Number)

Dear Sir/Madam

I intend to undertake voluntary work for NHS Lothian and I will use my vehicle to carry out voluntary duties and may carry passengers as requested. I will receive a mileage allowance for these journeys to contribute to the fuel and running costs of my vehicle. Such Expenses will be in accordance with the HM Revenue & Customs tax free rate per mile. I estimate the number of miles under this voluntary basis will be XXXX per year

I should be grateful if you would confirm that my existing policy covers me for such volunteer driving. Please complete the reverse part of this letter and return to me. Please also confirm that my insurance policy contains a clause indemnifying NHS Lothian with which I am a volunteer against third party claims arising out of the use of my vehicle for such voluntary work.

Yours faithfully

(Policy Holder)
This is to confirm that your policy covers voluntary driving (for which a mileage allowance may be received). This also confirms that the above policy contains a clause indemnifying NHS Lothian with which you are a volunteer against third party claims arising from the use of the vehicle on such voluntary work.
## Appendix 3a – Claim Form

**NHS Lothian**

CLAIM FOR EXPENSES FOR VOLUNTEERS (INCLUDING FOR P.F.P.I ACTIVITIES)

PLEASE COMPLETE IN BLOCK CAPITALS. REIMBURSEMENT OF ALL EXPENDITURE MUST BE AGREED IN ADVANCE AND FORMS SUBMITTED WITHIN 2 MONTHS OF ATTENDANCE.

<table>
<thead>
<tr>
<th>Date</th>
<th>Details of Volunteering Activity</th>
<th>Journey Details</th>
<th>Volunteers Mileage</th>
<th>Passenger Mileage</th>
<th>Travel Fares</th>
<th>Other expenses (Please list)</th>
<th>Cost of Other Expenses</th>
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Certification

I hereby certify that the above expenses were incurred whilst undertaking duties/attending meetings for NHS Lothian

Wish this payment to be paid directly into my bank account [YES/NO]

My account details are: **Sort Code** - [ ] **Account No.** - [ ]

Claimant's Signature: __________________________  Date: ____________

Please return completed form to the appropriate manager for authorisation and submission for payment.

<table>
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<tr>
<th>For official use only</th>
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<tbody>
<tr>
<td>Miles @..... per mile</td>
<td>£.........</td>
<td>volunteers</td>
<td>&amp;.........</td>
<td>passengers</td>
<td>&amp;.........</td>
<td>payment authorisation</td>
</tr>
<tr>
<td>Travel Fares / Other Expenses</td>
<td>£.........</td>
<td></td>
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<tr>
<td>Total Amount Due</td>
<td>£.........</td>
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</table>

| Financial Code | £......... |          |          |          |          |          |
| Financial Code | £......... |          |          |          |          |          |
| Financial Code | £......... |          |          |          |          |          |
| Financial Code | £......... |          |          |          |          |          |

Authorized forms to be forwarded to: Treasurer, Finance, Painted House, 1st Floor, 47 Robert Loan, Edinburgh, EH4 1TF
### APPENDIX 3b – Guide to Completing Volunteers Claim Form

Complete in the form in block capitals.

#### Sections to be completed by the Volunteer

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Name and Address</td>
<td>Enter your name and home address</td>
</tr>
<tr>
<td>2</td>
<td>Make of Vehicle and Reg No</td>
<td>If journey is by car, enter make and registration number of vehicle</td>
</tr>
<tr>
<td>3</td>
<td>Date</td>
<td>Enter the date of the Journey</td>
</tr>
<tr>
<td>4</td>
<td>Details of Volunteering Activity</td>
<td>Enter the details of the volunteering activity e.g. Attend Patient Forum or Volunteer Driver</td>
</tr>
<tr>
<td>5</td>
<td>Journey Details</td>
<td>Enter the Journey Details from starting point to destination and return e.g. Home to Royal Infirmary of Edinburgh (return).</td>
</tr>
<tr>
<td>6</td>
<td>Mileage Claimed</td>
<td>Enter the mileage claimed for each journey.</td>
</tr>
<tr>
<td>7</td>
<td>Travel Fares</td>
<td>Enter the cost of public transport e.g. bus fares etc</td>
</tr>
<tr>
<td>8</td>
<td>Other Expenses</td>
<td>List any other expenses incurred</td>
</tr>
<tr>
<td>9</td>
<td>Cost of Other Expenses</td>
<td>Enter the cost of each expense</td>
</tr>
<tr>
<td>10</td>
<td>Certification</td>
<td>State whether payment is to be made into your bank account and provide your bank details if applicable. Sign and date.</td>
</tr>
</tbody>
</table>

#### Sections to be completed by Responsible Officer or Authoriser

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>For official Use only</td>
<td>Calculate and enter the details of expenses to be paid to the Volunteer. Enter the full Financial Code i.e. 6 digit cost centre and 4 digit account code or Endowment Fund Code as appropriate</td>
</tr>
<tr>
<td>2</td>
<td>Authorisation</td>
<td>Attendance confirmed and contact telephone number should be completed by a responsible officer who can bear witness that the claimant did carry out the journeys claimed for. Payment authorisation must be signed by budget holder for the Financial Code or Endowments Fund that the expenditure is to be paid from as per the Authorised Signatory Database or Endowments Signatory list. Print name and enter date.</td>
</tr>
</tbody>
</table>
Appendix 4 – List of Cash Offices

Detailed below is a list of the Cash Offices or other sites, and the hours that they operate, where travel reimbursements can be made:

<table>
<thead>
<tr>
<th>Site</th>
<th>Cash Office Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>Astley Ainslie Hospital</td>
<td>Tues – Thurs: 08:30 – 13:00</td>
</tr>
<tr>
<td></td>
<td>13:30 – 16:30</td>
</tr>
<tr>
<td>Herdmanflat</td>
<td>Mon: 09:00 – 11:30</td>
</tr>
<tr>
<td></td>
<td>Wed – Fri: 09:00 – 11:30</td>
</tr>
<tr>
<td>Liberton</td>
<td>Mon – Thurs: 08:00 – 17:00</td>
</tr>
<tr>
<td></td>
<td>Fri: 08:00 – 16:30</td>
</tr>
<tr>
<td>Midlothian Community Hospital</td>
<td>Mon – Fri: 09:00 – 14:00</td>
</tr>
<tr>
<td>Princess Alexandra Eye Pavilion</td>
<td>Mon/Wed/Thurs 08:30 – 14:30</td>
</tr>
<tr>
<td>Royal Edinburgh Hospital</td>
<td>Mon – Fri: 09:30 – 13:00</td>
</tr>
<tr>
<td></td>
<td>14:00 – 16:00</td>
</tr>
<tr>
<td>Royal Hospital for Sick Children</td>
<td>Mon – Thurs: 08:30 – 13:00</td>
</tr>
<tr>
<td></td>
<td>13:30 – 16:30</td>
</tr>
<tr>
<td></td>
<td>Fri: 08:30 – 13:00</td>
</tr>
<tr>
<td></td>
<td>13:30 – 16:00</td>
</tr>
<tr>
<td>Royal Infirmary of Edinburgh</td>
<td>Mon – Thurs: 08:30 – 13:00</td>
</tr>
<tr>
<td></td>
<td>13:30 – 16:30</td>
</tr>
<tr>
<td></td>
<td>Fri: 08:30 – 13:00</td>
</tr>
<tr>
<td></td>
<td>13:30 – 16:00</td>
</tr>
<tr>
<td>St John's</td>
<td>Mon – Thurs: 08:30 – 13:00</td>
</tr>
<tr>
<td></td>
<td>13:30 – 16:30</td>
</tr>
<tr>
<td></td>
<td>Fri: 08:30 – 13:00</td>
</tr>
<tr>
<td></td>
<td>13:30 – 16:00</td>
</tr>
<tr>
<td>Western General Hospital</td>
<td>Mon – Thurs: 08:30 – 13:00</td>
</tr>
<tr>
<td></td>
<td>13:30 – 16:30</td>
</tr>
<tr>
<td></td>
<td>Fri: 08:30 – 13:00</td>
</tr>
<tr>
<td></td>
<td>13:30 – 16:00</td>
</tr>
</tbody>
</table>
Appendix 5 - Process Flowchart

Reimbursement of expenses to be discussed with potential new volunteers / member of the public prior to appointment / activity and / or with longstanding volunteers prior to allocation of specific duties

Individual completes and submits along with relevant receipts their completed claim form to the identified signatory

EXPENSES APPROVAL

Voluntary Services Manager (VSM) for Volunteer specific fund

VSMs can authorise up to £200.00, higher authorisation required above this.

Patient & Public Involvement

One off redesign consultations / working groups / committees

Funding approval as per local arrangement submit to Cashier / Treasury / Accounts Payable

Charge Nurse / Clinical Manager / Volunteer Lead for
1) Specific Endowment Funds
2) and / or Exchequer

1) Process to Endowment as per expense claim form
2) Process to Cashier / Treasury as per expense claim form

Reimbursement of expenses to be discussed with potential new volunteers / member of the public prior to appointment / activity and / or with longstanding volunteers prior to allocation of specific duties

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